

PALADIN DATA CORPORATION™

# Biz Coach Webinars

FREE ADVANCED TRAINING



Put together your next sale  
in record time

Charles Owen



TECHNICAL LEVEL:

EASY

INTERMEDIATE

ADVANCED



Put together your next sale in record time



- Goals
- Setting expectations
- Getting through the process
- Step-by-step procedure
- End game



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## Goals



- Randomly pick items to place on sale
- Automate the sale creation process
- Use the RF terminal to eliminate manual input



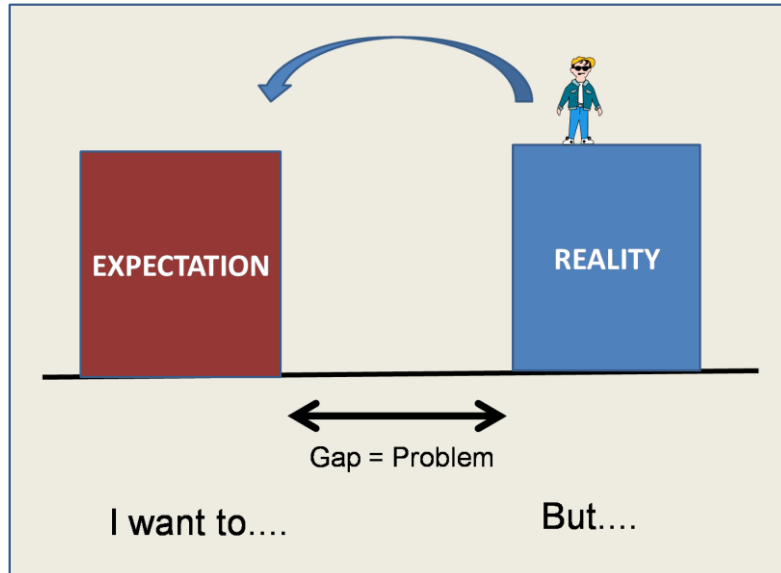
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## Setting expectations



- It's a great solution—*if you have a problem.*
- This is a work-around.
- Prerequisites:
  - Dozens of one-off products in the same promotion
  - Experience with Microsoft Excel
- Advantages:
  - Automates sale list creation and eliminates manual input.
  - Allows custom sale prices or a single shared percentage discount.
  - Fairly straightforward and easy to learn.



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## Getting through the process



1. Scan sale items with an RF terminal, as if you were creating a purchase order.
2. Export the saved “purchase order” to Excel.
3. In Excel, remove unnecessary columns.
4. Determine and set the desired sale price.
5. Import the Excel file into the **Sale List**.
6. Assign the **Sale List** to a **Pricing Plan** to activate it.



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## Step-by-step procedure



See Knowledge Base article [here](#)

1. Turn on the RF terminal, and select **3. Build working PO.**
2. Scan each sale item, and enter **1** (one) as the order quantity.
3. In Paladin Point of Sale, **P.O.** module, save the P.O. as **“Sale\_List”**.
4. In the **Maintain** menu, click **Data Viewer**, and then click the **Purchase Orders** tab.
5. In the **Type** menu, select **Stored PO.**
6. Highlight the PO you created, and then click **Export Inventory.**
7. Remove all columns, except the part number (**PARTNUMBER**) and retail price (**PLVL\_PRICE1**) columns.
8. Set the retail price (**PLVL\_PRICE1**) values to 0 (zero) or a fixed price depending on the type of discount you want to offer.
9. Import the Excel file into the **Sale List**, then activate a **Pricing Plan.**



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End game

Ready, set, sell...

PALADIN POINT OF SALE  
DEMONSTRATION



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Learn more

To learn more about this topic, see the following resources in our [Help Portal](#):

- [About pricing plans and sale lists](#)
- [How to use the RF terminal to import a sale list and activate a sale](#)
- [How to create a pricing plan with subclasses](#)
- [Automatically calculate prices for Sale List items with zero price](#)
- [Deleted Pricing Plans and Sale Lists](#)
- [How to create a sale list](#)
- [How to create the sale list import file and import it into a sale list](#)
- [How to make an active sale list inactive](#)
- [Sale list and pricing plan filters](#)
- [Sale List Price Change](#)
  
- [WEBINAR: Automating sales, promotions and trade discounts](#)

A recording of this webinar will be available at [portal.paladinpos.com/webinars](http://portal.paladinpos.com/webinars).



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